

## Annual Members' Assembly

11-12 September 2019

European Commission VM-2 building

Brussels, Belgium

### Board Paper: Strengthening the IATI Community to maximise impact

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#### Purpose

As highlighted in the IATI Strategic Plan 2020 - 2025, a strong and engaged community sits at the heart of IATI and will play a central role in realising the 2020 - 2025 strategy. Input from diverse members of the community is recognised as particularly important for the development of the IATI Standard, guidance and associated tools. This paper builds on the ideas outlined in the Strategic Plan and puts forward specific recommendations on strengthening the IATI Community for **discussion and decision** by the Members' Assembly.

#### Considering the issues

The IATI Technical Advisory Group (TAG) has evolved from a small group of experts to a large and vibrant community that includes skilled technicians, data users, publishers and newcomers to IATI. To quantify this evolution, at the initial Technical Advisory Group (TAG) meeting held in 2009, 21 attendees from 13 organisations gathered to develop proposals for the first release of the IATI Standard. At the 2018 TAG meeting, 158 attendees from 72 organisations attended with a range of different goals, from gaining a basic understanding of how to use IATI data, to developing best practice guidance on complex publishing issues.

In addition, beyond those who attend annual TAG meetings, over 1,400 people currently receive the fortnightly TAG newsletter. The strength and breadth of this community is a huge asset, with significant untapped potential, and deepening engagement with this wider group and drawing on their expertise will be key to IATI's future success.

The current approach of trying to address multiple needs through a single body has resulted in a gap in the mechanism for channelling detailed expert advice from the community on technical questions relating to the governance and management of the Standard. Governance of the Standard remains within the authority of the Members' Assembly and - since its inception in March 2016 - the Governing Board, both of which must be supported to make key decisions based on high quality technical advice<sup>1</sup> from experts within the community.

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<sup>1</sup> In this context, the term 'technical' is intended to include issues related to core IATI applications, such as the Registry, the Validator and the Datastore, issues related to the Standard, rulesets and code lists, and issues related to Strategic Plan objectives on increasing data use and data quality.

## Developing options

The Board had an informal discussion on future options at the 2018 TAG meeting. This question was also discussed at a Technical Workshop in Copenhagen in June 2019, as part of a series of consultations with different stakeholder groups on the draft Strategic Plan. These discussions have informed the proposals outlined below, which seek to build on the successful elements of the TAG by separating and strengthening both aspects of its current role - **knowledge sharing** between members of the community and the provision of **advice on specific issues** by community experts.

In order to address the issues identified here, a joint approach is recommended through the establishment of Communities of Practice and Working Groups.

### *Communities of Practice (COPs)*

COPs offer a structured way to share knowledge and experience, and in the context of IATI would allow users and publishers to come together via meetings, webinars and online spaces to discuss areas of mutual interest and learning. COPs could be established to address specific needs of humanitarian actors, developers, or CSOs sharing their experiences on mandatory publishing. The focus and nature of these groups would be determined by their members, and some may come together for specific time-bound activities while others may be ongoing.

COPs are largely self-organising, and in the context of IATI, would build on the success of the mini-TAG model. Light-touch coordination would help to avoid a proliferation of overlapping initiatives. Groups would require a mandate from the Board if they wished to apply for IATI funding or Secretariat support.

A community manager may be appointed to play a role in providing support across all COPs, ensuring that the learning and experience in each COP is shared with the wider community.

### *Working Groups (WGs)*

In addition to COPs, **Working Groups** could be mandated by either the MA or the Board on issues requiring advice from technical experts. These WGs would be specific and time-bound - for example a WG could be established to advise on specific areas of development within the Standard, or improvements to different parts of IATI's technical infrastructure. There are successful precedents for this approach, including the Data Use Task Force, the 2018 Technical Audit group, and the Sustainable Development Goals Reference Group which brought together several members of the community and the Secretariat to develop guidance on how to publish and use data on the SDGs.

## Board Proposal

In summary, this paper proposes that the Technical Advisory Group (TAG) becomes the **IATI Community**, with its activities taken forward through a combination of **Communities of Practice** to strengthen mutual learning and **Working Groups** to draw on the expertise of the community to advise the Board and the Members' Assembly on specific technical issues. The Governing Board will continue its oversight of WGs and COPs as well as the technical work of the Secretariat through its focal point arrangement, and this will be formalised through an amendment to IATI's Standard Operating Procedures.

The detailed proposals are as follows:

1. The model of joint learning and sharing through COPs is formalised, to strengthen the IATI Community, and provide ways for community members with shared interests to support each other.
2. Members of the community are encouraged to form COPs, which will as appropriate be given space and resources on IATI platforms and at IATI events in order to meet, discuss and share their insights with the wider community. COPs may also be created by the Secretariat to meet identified needs, for example the information needs of new publishers.
3. In addition, Working Groups (WGs) are established on specific issues that require input from technical experts. These groups would be mandated by either the MA or the Board and their terms of reference and membership approved by the Board, ensuring there is a good balance of technical expertise with representation from different parts of the IATI Community. These WGs would be advisory in nature and they would report to the IATI Board, with appropriate budget and Secretariat support provided to assist them in carrying out their work.
4. The roles of the Board's 'technical focal points' are formally recognised through an amendment to IATI's SOPs, to ensure ongoing oversight of the technical team's work at Board level. While the evolution of the TAG into the IATI Community would make the role of the TAG Chair redundant, it is proposed to maintain the current technically-focused seat on the Board elected by the broader IATI Community. This approach could serve to promote deeper engagement across the community, and may be combined with a move towards formal registration of IATI community members.
5. In place of an annual TAG meeting, IATI should consider trialling an annual IATI conference as a new event which would serve to bring together the whole IATI Community. There would be space at this event for Communities of Practice and Working Groups to meet, and the Members' Assembly could continue as a members-only segment of this annual conference.

## Action required

Members are asked to confirm the following decisions to take forward implementation of this approach:

- Approve a model of Communities of Practice (COPs) and Working Groups (WGs) and make recommendations on which WGs should be established as a priority.
- Consider trialling a new IATI annual conference bringing together all members of the IATI Community, with the Members' Assembly taking place as a members-only segment of this broader annual meeting.
- Request the Secretariat to further flesh out protocols and policies to operationalise this new approach and to update IATI's Standard Operating Procedures to reflect this decision.